VALUATION FEE AUTHORISATION FORM

Who is this form for?

This form is for individual, trustee and corporate policyholders of a PIMS policy. It allows you to authorise RL360 to deduct a valuation fee for a valuation statement that is requested by a third-party, and in addition to the scheduled valuation statements we provide.

Completing this form

By completing this form you will be allowing a third-party (usually your Financial Adviser, Investment Adviser or Discretionary Manager) to receive a valuation statement, for which RL360 will deduct a valuation fee.

We can only accept original written instructions by post that have been signed by all individual policyholders, trustees or authorised signatories. We will not accept instructions by email or fax.

Please complete in BLOCK capitals throughout.

Important information

The valuation fee is a fixed amount as detailed in your product literature, and on our website. The fee is deducted from the policy cash account on the date the valuation statement is issued.

Valuation statements are available for download, free of charge, by registering for our Online Service Centre. Please contact us on +44 (0)1624 681682 or by email to websupport@rl360.com for further details on how to register.

Please return this form to: Customer Service Centre, International House, Cooil Road, Douglas, Isle of Man, IM2 2SP, British Isles.

Privacy policy

Our full privacy policy can be viewed at www.rl360.com/privacy or can be obtained by requesting a copy from our Data Protection Officer.

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Policy number

Name(s) — **Policyholders/trust/company**

I/We agree to the following receiving an additional valuation statement which will result in a fee being deducted from the policy cash account.

Name of third party

	Policyholder/Trustee/Authorised Signatory	**Policyholder/Trustee/Authorised Signatory**
Signature		
Date (dd/mm/yyyy)		
	Trustee/Authorised Signatory	**Trustee/Authorised Signatory**
Signature		
Date (dd/mm/yyyy)		

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